

# APPRAISER ROLE

## Role Summary

The Appraiser Role consists of five grade levels (11-15). Incumbents are responsible for conducting and defending appraisals, specifications and calibration of tables, manuals, and models. Appraisers at all levels are responsible for discovery of property, which has yet to be assessed. Work ranges from the review of individual residential property characteristics consisting of site and improvement data using three value approaches for residential property; assisting in cost, market, and income modeling; assisting in the development of the narrative approach on unique and disputed properties; to industrial and utility appraisal work. Primary contacts are with the division administrators, regional managers, area managers, other appraisers, property valuation specialists, cartographers, management analysts, internal/external customers, other agency partners, and Information Technology (IT) staff.

## Working Conditions

Field appraisal audits involve travel at least 50% of the time during summer and fall months, sometimes in adverse weather conditions and poor roads. Less travel is scheduled during the spring and winter months. The physical demands often include physical inspections of properties and structures; climbing ladders and stairs in multi-story structures; working in extremes of heat and cold; working in areas that may include hazardous, dusty, or noisy areas; extensive walking; and sitting for long periods of time while driving and doing desk work. Pressure and stress when dealing with irate taxpayers. A valid driver's license is required.

## Education and Experience

- Grade 11: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and three years of experience in construction, real estate or closely related field. Montana certification in residential appraisal is required. Other combinations of education and experience will be evaluated on an individual basis
- Grade 12: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and three years of experience in construction, real estate, agriculture, or closely related field. Montana certification in both residential and agricultural appraisal is required. Other combinations of education and experience will be evaluated on an individual basis
- Grade 13: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and three years of experience in construction, real estate, or closely related field and appraisal-related experience. Montana certification in residential, agricultural, and commercial appraisal is required. Other combinations of education and experience will be evaluated on an individual basis
- Grade 14: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in business administration, public administration, or a closely related field and five years of experience in the property tax field including three years of appeal defense. Other combinations of education and experience will be evaluated on an individual basis

- Grade 15: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in the arts and sciences, engineering, construction, industrial processes, business, economics, finance, accounting, or a related field. Must have four years comprehensive appraisal/assessment experience, including two years dealing specifically with industrial plants or commercial properties (land, buildings, machinery, and equipment) for ad valorem tax purposes and defending these values at tax appeal hearings. Montana certification in residential, agricultural, commercial, and industrial property appraisal is required. Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Competencies**

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

### **Grade Levels**

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

**Appraisers at all grade levels:**

- Participate in dispute resolution.
- Serve as a contact for taxpayer inquiry.
- Contact customers for compliance.
- Represent the department in appeal hearings.

**Grade 11****Predominant/Essential Duties**

- Pro-active search and discovery of property.
- Review individual residential property characteristics consisting of site and improvement data.
- Apply the three approaches to value for residential property (cost, market, and income).
- Review comparable sales sheets.
- Assist with gathering and verifying information for residential land valuation.
- Assist with gathering and verifying information for residential sales comparison (market) models and cost models.
- Discover, list, and analyze residential sales.
- Perform benchmarking of property characteristics.
- Discover, list, analyze, and determine a final value using approaches to value applicable to individual residential property.
- Assist with land model specification and calibration.

**Grade 12****Predominant/Essential Duties**

- Perform agricultural and forest land appraisal activities.
- Review individual residential, agricultural, and forestland property characteristics consisting of site and improvement data.
- Review agricultural and forestland use application forms.
- Assist with gathering and verifying information for residential, agricultural, and forest land valuation.
- Assist with gathering and verifying information for residential, agricultural, and forest land sales comparison (market) models.
- Analyze, assess, and reclassify land according to agricultural and forest land use.
- Assist in the discovery, listing, and analysis of commercial property.
- Assist in gathering income and expense data.
- Discover, list, analyze, and determine a final value using appropriate approaches to value on individual residential and agricultural property.
- Assist with land model specification and calibration.
- Assist with sales comparison (market) model specification and calibration.

**Grade 13****Predominant/Essential Duties**

- Perform local residential and commercial quality control reviews.
- Perform analysis of local land valuation.
- Assist in land model specification and calibration.
- Assist in sales comparison (market) model specification and calibration.
- Assist in income model specification and calibration.
- Discover, list, analyze, and determine a final value using appropriate approaches to value on commercial property.

- Discover, list, and analyze commercial sales.
- Responsible for the gathering, input, and analysis of income and expense data for valuation.

## **Grade 14**

### Predominant/Essential Duties

#### Industrial Appraisal Function

- Assist in statewide quality control reviews within industrial types.
- Assist in developing narrative appraisals on unique and disputed properties.
- Discover, list, analyze, and determine a final value using appropriate approaches to value on real and personal industrial property.
- Assist in the collection and analysis of income and expense, cost, and market data for use in valuing personal and real industrial property.

#### Utility Appraisal Function

- Assist in statewide quality control reviews within industrial types.
- Assist in developing narrative appraisals on unique and disputed properties.
- Discover, list, analyze, and determine a final value using appropriate approaches to value on real and personal industrial property.
- Assist in the development of industry specific capitalization rates.

#### Regional Field Appraisal Function

- Serve as regional complex property appraiser.
- Staff advisor on complex properties and taxpayer resolution.
- Systematically review work of staff appraisers.
- Ensure consistency of residential and commercial appraisals among regional staff.
- Perform regional data and valuation quality control for all properties, including individual property appraisal reviews of five appraisals per appraiser per year.
- Perform regional sales comparison (market) model specification and calibration.
- Perform regional income model specification and calibration.
- Perform regional land model specification and calibration.
- Write narrative appraisal reports on complex, unique, and disputed properties.
- Responsible for defending complex appraisals, specifications, and calibration of tables, manuals, and models.
- As directed by regional and area managers, distribute task assignments and oversee completion among regional staff.

## **Grade 15**

### Predominant/Essential Duties

#### Industrial Appraisal Function

- Perform statewide quality control reviews within industrial types.
- Develop narrative appraisals on unique and disputed properties.
- Discover, list, analyze, and determine a final value using appropriate approaches to value on real and personal industrial property.
- Collect and analyze income and expense, cost, and market data for use in valuing personal and real industrial property

#### Utility Appraisal Function

- Perform statewide quality control reviews within utility types.
- Develop narrative appraisals on unique and disputed properties.

- Discover, list, analyze, and determine a final value from up to three approaches on individual utility property.
- Collect and analyze income and expense, cost, and market data for use in valuing utility property.
- Develop industry specific capitalization rates.

### **Competencies and Degrees of Proficiency**

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

## Competency/Proficiency Chart - Appraiser Role

Competencies	Grade 11 Under Guidance	Grade 12 Minimal Guidance	Grade 13 Minimal Guidance	Grade 14 Minimal Guidance	Grade 15 Independently
Demonstrated ability to think creatively and recommend innovative solutions.	A	B	C	C	C
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	B	B	C	C	C
Demonstrated knowledge of appraisal principles, theory, and methodology for real and personal property valuation and assessment.	B	B	C	C	D
Demonstrated knowledge and ability in negotiation techniques relative to the role.	B	B	C	C	D
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	B	B	C	C	D
Demonstrated knowledge of building construction, equipment, and leases as required for classification.	B	B	C	C	D
Demonstrated knowledge of a full range of mathematical skills relative to appraisal assignments.	B	B	C	C	D
Demonstrated ability to analyze and understand financial and real estate market information relative to appraisal.	B	B	C	C	D
Demonstrated knowledge and ability in organization techniques relative to the role.	B	B	C	C	C
Demonstrated analytical skills relative to the role.	B	B	C	C	C
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	B	B	C	C	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	B	B	C	C	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	B	B	C	C	C
Demonstrated knowledge of mass appraisal.	B	B	C	C	D
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	B	B	C	C	D
Demonstrated ability to research, collect data, and prepare necessary reports.	B	B	C	C	D
Demonstrated knowledge of fundamentals of land records.	B	B	C	C	C

### **Degree of Proficiency**

**A:** A degree of knowledge, skill, or ability commensurate with elementary-level tasks and assignments.

**B:** A degree of knowledge, skill, or ability commensurate with intermediate-level tasks and assignments.

**C:** A degree of knowledge, skill, or ability commensurate with advanced-level tasks and assignments.

**D:** An advanced degree of knowledge, skill, or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

**E:** The most advanced degree of knowledge, skill, or ability evidencing complete mastery and understanding of the subject.

APPRAISER TAX MATRIX					
Grade	Residential	Ag/Forest	Commercial	Industrial	Utility
11	<ul style="list-style-type: none"> <li>Final valuation of residential property</li> </ul>				
12		<ul style="list-style-type: none"> <li>Perform agriculture and forestland appraisal activities</li> <li>Review site and improvement data</li> </ul>			
13			<ul style="list-style-type: none"> <li>Final evaluation of commercial property</li> <li>Perform local quality control</li> <li>Assist in cost/market/ income model specifications</li> <li>Mentor/assist with on-the-job training</li> </ul>		
14			<ul style="list-style-type: none"> <li>Perform area-wide quality control</li> <li>Perform cost/market/ income model specifications</li> <li>Mentor/assist with on-the-job training</li> </ul>	<ul style="list-style-type: none"> <li>Final evaluation of industrial property</li> <li>Assist in development of narrative appraisal reports</li> <li>Assist with statewide quality control</li> </ul>	<ul style="list-style-type: none"> <li>Assist in statewide quality control</li> <li>Assist in development of narrative appraisal reports</li> <li>Assist with industry specific cap rates</li> <li>Assist in final evaluation of utility property</li> </ul>
15				<ul style="list-style-type: none"> <li>Perform state-wide quality control</li> <li>Develop narratives</li> </ul>	<ul style="list-style-type: none"> <li>Perform statewide quality control</li> <li>Develop narratives</li> <li>Develop industry specific cap rates</li> <li>Perform the final evaluation of utility property</li> </ul>

Each grade represents an increase in complexity, knowledge, competency, and proficiency.